

**MONTANA STATE HISTORIC PRESERVATION OFFICE
MONTANA HISTORICAL SOCIETY**

**Federal FY2008
Annual Report of Activities
(October 1, 2007 – September 30, 2008)**

**in accordance with
PRESERVE MONTANA: The Montana Historic Preservation Plan 2008-2012**



December 2008

**Montana State Historic Preservation Office
Montana Historical Society
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**Big Sky. Big Land. Big History.
Montana
Historical Society**

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On the cover:
Mining cabin, Cooke City, Montana
Tim Urbaniak, photographer, 2006

PRESERVE MONTANA:
The Montana Historic Preservation Plan, 2008-2012
Goals and Objectives

Goal I. EDUCATE: Building a foundation for historic preservation through knowledge and awareness.

Objectives:

1. Gather, develop, and disseminate historic preservation guidance and standards.
2. Instill awareness and appreciation for Montana's heritage and heritage properties.
3. Promote learning opportunities with the public and interest groups.
4. Pursue new ways and means to share information about Montana's historic, pre-contact and traditional cultural properties.

Goal II. CELEBRATE: Promoting preservation with recognition, praise, and acknowledgement.

Objectives:

1. Use multi-media to convey historic preservation successes and opportunities.
2. Promote forums to acknowledge and reward outstanding achievements and efforts in historic preservation.
3. Facilitate recognition of historic properties through signage, published materials, events, and programs.

Goal III. LOCATE and EVALUATE: Identifying and documenting Montana's significant heritage places worthy of preservation.

Objectives:

1. Survey or support the survey of un-inventoried properties throughout the state.
2. Guide the development and use of historical contexts for evaluating the significance and integrity of Montana's pre-contact, historic and cultural sites.
3. Encourage and assist owners to document and list properties in the National Register of Historic Places.
4. Enhance the management of and access to cultural resource information.

Goal IV. ADVOCATE: Seeking support of preservation through funding, incentives, and protection.

Objectives:

1. Encourage the integration of historic preservation in planning and policy-making.
2. Promote the cultural, social, and economic benefits of historic preservation.
3. Provide leadership and vision in historic preservation.
4. Implement existing preservation legislation and encourage new laws and incentives to protect heritage properties.
5. Seek additional financial resources to supplement funding for historic preservation.

Goal V. COLLABORATE: Working together to preserve Montana's historic, pre-contact, and traditional cultural properties.

Objectives:

1. Reach out to federal, state, tribal, and local public and private stakeholders.
2. Sponsor or participate in forums to share ideas, experience, and information.
3. Solidify existing partnerships and form new consensus for the benefit of historic preservation.
4. Meet regularly with tribal cultural representatives to facilitate consideration of tribal perspectives in historic preservation.

Three FY2008 Montana Historic Preservation Highlights

PRESERVE MONTANA: The Montana Historic Preservation Plan, 2008-2012

The revised and updated Montana state plan, *PRESERVE MONTANA: The Montana Historic Preservation Plan, 2008-2012*, was approved by the National Park Service, Heritage Preservation Services, on January 17, 2008. This 65-page plan was the culmination of over a year's effort involving public and stakeholder input to identify the current status and issues and opportunities in historic preservation in Montana. Five new goals with 20 objectives were developed to guide statewide preservation efforts under the vision that: *Montana is a place that knows, respects and celebrates its heritage, openly encouraging and supporting the preservation of its significant historic, pre-contact, and traditional cultural properties.*

PRESERVE AMERICA funding continues to support preservation in Montana

In FY2008, Montana SHPO continued its successful bid for national Preserve America funding with notification in April of a third approved matching grant of \$149,979 for *Montana Places: Expanding the Cultural and Historical Record of Montana*. As implied by the title, this program will support new research and documentation of historic, archaeological, and traditional cultural resources in Montana, focusing on the state's 19 designated Preserve America communities so that they have proper documentation for preservation and promotion of their historic resources. Funds will also be used to hold a Tribal Heritage Resource Summit in FY2009 for Montana's Indian Tribes for the purpose of discussing potential areas of survey and specific undocumented landscapes and cultural resources important to Montana's rich Native American heritage. This grant brings the total Preserve America funding secured by Montana SHPO over the past two years to just under \$400,000, most of which has been sub-granted to support preservation efforts of local communities and organizations. For more information visit <http://mhs.mt.gov/shpo/PreserveAmerica.asp>

Preserving Montana barns – help continues

The Montana SHPO Rural Property Bricks-and-Mortar Grant program, initiated in FY2006, continued in FY2008 with the completion of work on two properties and the awarding of three more matching grants to help stabilize and preserve rural historic structures. \$15,000 in matching SHPO state-funded support provided assistance to the preservation of the J.C. Adams Stone Barn in Cascade County and the Cavalry Stable at Fort Assiniboine in Hill County. \$27,000 in awarded matching SHPO state and HPF funds will support work through FY2009 at the Naylor barn on the Mountain View Ranch in Buffalo (Fergus County), the Old Settler's barn on the Chicken Creek Farmstead in Clyde Park (Park County), and the Fenton Homestead barn near Sheridan (Madison County). In addition, \$12,000 of FY2008 HPF funds was used in support of the National Register nominations of the Mountain View and Chicken Creek properties. Through this support, these icons of Montana's rural heritage will continue to contribute many more years of use, as well as enjoyment.

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ADMINISTRATIVE PROGRAM

. Perform regular, allowable administrative activities that contribute to the preservation of Montana's cultural resource properties, including: budget formulation; personnel management and staff development; administrative organization; and responsible fiscal management {2008-2012 Goals/Objectives: IV.3, IV.5, V.1, IV.3}

- ✓ Complied with state and National Park Service (NPS) policies and procedures in allocation and expenditure of FY2008 federal grant allocation (Historic Preservation Fund) to Montana SHPO totaling \$663,669.
- ✓ Maintained professional staffing requirements (8.75 FTE) including individuals meeting or exceeding the Secretary of the Interior Standards for Professional Qualifications in historic preservation, history, architectural history, and archaeology.
 - Hired Roxann Lincoln as Preservation Grants Manager in October 2007, to replace Melisa Kaiser who left in August to become a grant writer for the Montana Wilderness Association.
 - Hired John Boughton, M.A., as new National Register Coordinator in September 2008 to replace Kate Hampton who left in July 2008 to become Endangered Sites Program Coordinator for the Montana Preservation Alliance.
- ✓ Staff development: attendance and participation in professional conferences and workshops to maintain and enhance staff knowledge, skills, and abilities:
 - National Trust for Historic Preservation conference, Minneapolis, MN, October 1-6, 2007 (Rolene Schliesman)
 - Montana History Conference, Helena, October 18-20, 2007 (Mark Baumler, Damon Murdo, Pete Brown, Josef Warhank, Rolene Schliesman, Kate Hampton, Roxann Lincoln)
 - Supervisor & Labor Management training workshop, Montana Historical Society/Department of Administration, Helena, November 19-20 and December 4, 2007 (Mark Baumler, Stan Wilmoth, Kate Hampton)
 - Microsoft EXCEL training, Helena, December 4, 2007 (Roxann Lincoln)
 - Customer service training, Montana Historical Society, Helena, December 14, 2007 (Roxann Lincoln)
 - Contractor Agreements training, Montana Historical Society, Helena, March 25, 2008 (Roxann Lincoln, Kate Hampton, Rolene Schliesman)
 - Society for American Archaeology 73rd Annual meeting, Vancouver, BC, Canada, March 26-31, 2008 (Mark Baumler, presenter)
 - Montana Governor's Conference on Tourism, West Yellowstone, April 16-18, 2008 (Roxann Lincoln)

- Montana Archaeological Society 50th Annual Meeting, Billings, April 18-20, 2008 (Mark Baumler, Stan Wilmoth, Damon Murdo, Josef Warhank)
 - National Bureau of Land Management Data Sharing Group Workshop, Carson City, NV, April 21-25, 2008 (Damon Murdo)
 - CPR/HeartSaver First Aid training, Montana Historical Society/St. Peters Hospital, Helena, April 28, 2008 (Pete Brown)
 - Employee Performance Evaluation training, Montana Historical Society/Department of Administration, Helena, April 30, 2008 (Mark Baumler)
 - Vernacular Architecture Forum (VAF) Annual Conference, Fresno, CA, May 6-11 (Rolene Schliesman, presenter)
 - Introduction to State Accounting, Budgeting, and Human Resources System (SABHRS), Department of Administration, Helena, May 12, 2008 (Roxann Lincoln)
 - Telephone Presence training, Professional Development Center, Department of Administration, Helena, July 8, 2008 (Marlene Carbis)
 - Section 106: A Review for Experienced Practitioners workshop, National Preservation Institute, Washington, D.C., September 8-9, 2008 (Josef Warhank)
 - Montana Mainstreet 1st Annual Statewide Conference, Butte, September 29-30, 2008 (Rolene Schliesman)
- ✓ Richard Sims, Montana Historical Society Director, represented Montana SHPO at the National Conference of State Historic Preservation Officers (NCSHPO) Annual Meeting, Washington, D.C., March 2-5, 2008.
 - ✓ 2008 State Service Awards: Mark Baumler (20 years), Stan Wilmoth (15 years), Pete Brown (5 years), Rolene Schliesman (5 years).
 - ✓ Met monthly with Montana Historical Society Centralized Services Division to monitor State Historic Preservation Office budget and expenditures.
 - ✓ Participated in update and development of Montana Historical Society agency employee Ethics Code and Pay-Plan Policy.
 - ✓ Conducted annual performance evaluations of all SHPO employees.

. Special FY2008 project: Develop and disseminate updated preservation funding and fiscal reporting guidance and training for sub-grantees, including Certified Local Governments and Preserve America Communities (2008-2012 Goals/Objectives I.1, I.3; IV.5).

- ✓ Roxann Lincoln, SHPO Preservation Grants Administrator, created a PowerPoint presentation of historic preservation funding sources: *Show me the Money! Finding Preservation Dollars*. Presented at two new CLG-MHS/SHPO orientations (February 6-7 and April 24-25, 2008) and at Montana Historical Society County History Initiative workshop in Helena (May 12, 2008).

- ✓ Roxann also created a PowerPoint presentation of SHPO historic preservation grant reporting requirements. Presented at two new CLG-MHS/SHPO orientations in Helena (February 6-7 and April 24-25, 2008).
- ✓ Roxann and Rolene Schliesman, Community Preservation Coordinator, created a new Montana SHPO webpage for Preserve America grants, including information on applications, reporting, projects, and links to the national website. See <http://mhs.mt.gov/shpo/PreserveAmerica.asp>
- ✓ Updated and posted information on grants on the Montana SHPO homepage (<http://mhs.mt.gov/shpo/default.asp>) under *Dollars for Preservation*.
- ✓ Regularly advised sub-grantees and answered questions about programs and reporting requirements. Met onsite with Boulder and Butte Preserve America communities.

PLANNING PROGRAM

. Perform regular, allowable planning activities that contribute to the preservation of Montana's cultural resource properties, including participation in the creation, review, and revision of agency and local plans; the development of historic contexts; the support of state and local preservation ordinances, regulations, and laws; and the application of advanced technologies in historic and prehistoric property preservation planning (2008-2012 Goals/Objectives: I.1, I.4, III.2, III.4, IV.1, IV.2, IV.4, V.2, V.4)

- ✓ Completed updated and revised 5-yr state preservation plan *PRESERVE MONTANA: The Montana Historic Preservation Plan, 2008-2012*. Approved by the National Park Service, Heritage Preservation Services, on January 17, 2008.
- ✓ Routinely monitored FY2008 SHPO activities and proposed special projects in accordance with the goals and objectives of the 2008-2012 Montana State Preservation Plan: *PRESERVE MONTANA*.
- ✓ Participated in revision of Montana Historical Society agency revised 2009-2013 strategic plan.
- ✓ Reviewed and commented on a variety of federal, state, and local agency and organization planning and management documents, with respect to goals and objectives in the preservation of Montana heritage properties.

. Special FY2008 Project: Promote awareness and use of PRESERVE MONTANA: The Montana Historic Preservation Plan, 2008-2012 (2008-2012 Goals/Objectives I.3, IV.1, V.1).

- ✓ Posted *PRESERVE MONTANA: The Montana Historic Preservation Plan, 2008-2012* on the Montana SHPO homepage at <http://mhs.mt.gov/shpo/default.asp>

- ✓ Announced availability of new statewide plan in communications, reports, meetings, and workshops with both public and professional audiences.
- ✓ Encouraged reference and use by Certified Local Government and Montana Preserve America communities in local plans and grant applications.
- Production of State Plan brochure postponed in FY2008 due to limited funding and staff time. Tentatively programmed for FY2009.

SURVEY AND INVENTORY PROGRAM

. Perform regular, allowable survey and inventory activities that contribute to the preservation of Montana's cultural resource properties, including: the conduct or support of surveys to locate, identify, record, and evaluate historic and pre-contact sites; the development, maintenance and use of cultural resource inventory information; and the application of new technologies in support of the above (2008-2012 Goals/Objectives: I.4, III.1, III.4)

- ✓ 697 new cultural resource reports were acquired and added to the SHPO statewide Cultural Resource Annotated Bibliography System (CRABS) and inventory library, representing 146,650 acres of new survey [FY2007: 106,615 acres; FY2006: 145,647 acres; FY2005: 131,067 acres]. There are presently over 30,000 documents in CRABS.
- ✓ 900 newly recorded cultural resource properties added to the Montana Cultural Resource Information System (CRIS) database and statewide inventory maintained in partnership with the University of Montana, Department of Anthropology, Site Records Office. These include 446 new historic properties, 434 pre-contact sites, and 20 combination historic/pre-contact sites. Updated information was collected on an additional 369 previously recorded properties. There are over 48,000 total cultural resource properties recorded in Montana.
- ✓ Successfully applied for and received a 2008 Preserve America grant for \$149,979 in support of *Montana Places: Expanding the Cultural and Historical Record of Montana*. The majority of this award will be used in FY2009-10 for competitive sub-grants for the survey and documentation of historic resources within Montana's nineteen designated Preserve America communities as a basis for enhanced local heritage tourism and economic development. Deadline for applications September 12, 2008; awards to be made in October.
- ✓ *Assault on Basalt: The Cashman Archaeological Quarry (24MA1618)*, Montana The Magazine of Western History, Summer 2008, pp 74-76 by Mark Baumler, describing the joint Montana Historical Society-Montana Archaeological Society survey research efforts to successfully fingerprint a previously unknown regional pre-contact source of dacite tool-stone in southwestern Montana.

- ✓ SHPO provided technical and/or fieldwork assistance to a variety of FY2008 survey and inventory efforts, including those of the University of Montana (Chinese Historical Archaeological Field School in Big Timber and the Montana Yellowstone Archaeological Research Project outside Gardiner); a proposed community survey of the Jackson Street Neighborhood in Helena; documentation of vernacular architecture in Anaconda (in preparation for the 2009 Vernacular Architecture Forum conference in Butte); architectural survey of the Veterans Administration hospital district at Fort Harrison, Helena; and recording of archaeological rock features near Clark Canyon Reservoir by the Montana Department of Natural Resources and Conservation, Trust Lands Division (Beaverhead County near Dillon).
- ✓ Marlene Carbis, SHPO Administrative Assistant, compiled an Excel spreadsheet of cross-referenced inventory information on Helena residents and addresses from the 1890 and 1900 city Polk Directories.
- ✓ Awarded \$7,500 from the Montana Historical Society Sobotka Expendable Trust to two archaeological research projects: Montana State University excavations at Horseshoe Cave (24RB1094) in Rosebud County and Bureau of Land Management radio-carbon dating of previously excavated archaeological layers at Deadman Cave (24CR0297) in Custer County.
- ✓ SHPO and the University of Montana Site Records Office worked collaboratively in ongoing enhancements of the State Antiquities Database, including hardware and software upgrades (conversion to .pdf site form scanning) and continued development of Geographic Information System (GIS) capabilities (see below, Special Project).

. Special Project: Work with Montana Historical Society state museum staff to develop an archaeological curation management policy and plan (2008-2012 Goals/Objectives III.4, IV.3).

- ✓ Stan Wilmoth, SHPO State Archaeologist, met with Montana Historical Society Museum staff regarding proposed archaeological collection curation policy and guidance.
- ✓ Reviewed existing archaeological collection management plans and policies, especially National Park Service, Montana BLM Billings Curation Center, and California state guidance.
- ✓ Prepared draft document for revision and consistency with general Montana Historical Society Museum curation plan (pending).

. Special Project: Pursue and lead the continuing creation and development of a statewide cultural resource information geo-database/Geographic Information System (GIS) (2008-2012 Goals/Objectives I.4, II.4).

- ✓ Damon Murdo, SHPO Cultural Records Manager, researched and consulted with other SHPOs regarding state Cultural Resource GIS systems. Attended national Bureau of Land Management Data Sharing Group Workshop in Carson City, NV, April 21-25, 2008.
- ✓ Met regularly through Fall 2007-Spring 2008 with Montana Department of Administration Information Services Technology Division (ITSD) resulting in development of ITSD-SHPO service level agreement that:
 - Upgraded the State Antiquities Database to Montana state standard (Oracle 9.2) and established parameters for secure access by existing outside partners, including The University of Montana and the Bureau of Land Management. (Completed, pending editing of some corrupted menu/search routines).
 - Merged the two geo-database projects created in FY2007 (National Register of Historic Places and Southeast Montana Cultural Resource Project) into a single geo-database. Adapted the spatial data entry system from the Southeast Montana Cultural Resource Project to allow the entry of new ongoing spatial data by SHPO and University of Montana Site Records Office staff into the geo-database (Completed, pending assignment of dedicated server space with controlled access protocols).
 - Created Functional Requirement Specifications for the development of an online user search and mapping interface for the geo-database, with both public and professional level platforms (Completed; development of user interface pending above and sufficient funding in FY2009).
- ✓ The development of the initial Montana statewide cultural resource information geo-database will continue in FY2009, with an anticipated launch in Spring 2009.

NATIONAL REGISTER OF HISTORIC PLACES PROGRAM

. Perform regular, allowable National Register program activities that contribute to the preservation of Montana's cultural resource properties, including: support for the Montana State Historic Preservation Review Board; documentation and evaluation of properties for potential National Register listing; preparation and submission of nominations for eligible properties to be listed in the National Register of Historic Places; participation in the designation of National Historic Landmarks; public education and promotion of the National Register program; and the support of the official Montana National Register property sign program (2008-2012 Goals/Objectives: I.2, II.3, III.3)

- ✓ Three meetings of the Montana State Preservation Review Board were held in 2008: Helena (January 25-26); Missoula/Hamilton (June 27-28); and Havre (October 3-4). Thirteen (13) new draft National Register nominations were reviewed and passed; none failed.

- ✓ Seventeen (17) new Montana properties were officially listed in the National Register of Historic Places in FY2008 (by county):

Elkhorn-Coolidge Historic District, Beaverhead County <i>(138 contributing sites, structures and buildings)</i>	09/12/2008
Van Camp-Tash Ranch, near Dillon, Beaverhead County	04/16/2008
First National Bank of Geraldine, Choteau County	01/09/2008
Stateler Memorial Methodist Church, Willow Creek, Gallatin Co	07/29/2008
Logan Pass Visitor Center, Glacier NP, Glacier County	04/15/2008
St. Mary Visitor Center, Glacier NP, Glacier County	04/15/2008
Chief Mtn Border Station & Quarters, Glacier NP, Glacier County	05/20/2008
Cut Bank Municipal Airport & Army Air Force Base, Glacier Co	01/29/2008
Lavina State Bank, Golden Valley County	12/17/2007
Charles A. Broadwater House, Helena, Lewis & Clark County	08/27/2008
Libby High School, Lincoln County	08/20/2008
Ferris-Hermesmeier-Fenton Ranch, Madison County	01/09/2008
Roundup Central School, Musselshell County	12/06/2007
Roxy Theater (Missoula University Area HD), Missoula County	08/29/2008
Deer Lodge Central Business Historic District, Powell County <i>(45 contributing buildings)</i>	08/13/2008
St. Philip's Episcopal Church, Rosebud, Rosebud County	11/20/2007
Vogt-Nunberg Farm, near Wibaux, Wibaux County	04/10/2008

- ✓ \$12,000 of FY2008 HPF funds used in support of preparation of National Register nominations of the Mountain View Ranch ("Naylor Brothers Ranch") in Fergus County and the Chicken Creek Farmstead in Park County, participants in the Montana SHPO Rural Property Brick-and-Mortar Grant program.
- ✓ Presented progress report and update in August 2008 in Whitefish to the Montana Land Title Association Foundation for the use of FY2008 \$10,000 donation to support National Register nomination research and preparation. Properties assisted by funds in FY2008: Stateler Memorial Methodist Church, Willow Creek, Gallatin County (NR listed 7/29/2008); Wold Barn, Melrose, Silver Bow County (pending, passed Review Board, June 28, 2008); Elkhorn-Coolidge Historic District, Wise River vicinity, Beaverhead County (NR listed 9/12/2008).
- ✓ Received renewed \$10,000 donation from Montana Land Title Association Foundation to support continued research and writing of National Register nominations in FY2009.
- ✓ Regularly discussed and met with public and private owners of historic properties interested in listing in the National Register of Historic Places. Provided workbooks to owners to initiate research and documentation. Made presentation to Helena-Lewis & Clark County Preservation Commission regarding nomination of Le Grande Canon Boulevard (on hold) and field visits to the proposed Jackson Street Neighborhood and Fort Harrison Hospital historic districts in Helena. Provided guidance to Geraldine High School student class for preparation of a nomination for the Square Butte School in Choteau County.

- ✓ Routinely provided information to public inquiries regarding Montana properties currently listed in the National Register of Historic Places. Updated and revised the Montana SHPO online list of National Register of Historic Places properties in Montana: <http://mhs.mt.gov/shpo/register/NRmap/NRmap.htm>
- ✓ Documented and concurred in 208 evaluations of National Register eligibility and 311 evaluations of ineligibility of historic and archaeological properties (i.e., “consensus determinations”) within the context of Section 106 and Section 110 federal inventory under the National Historic Preservation Act.
- ✓ Gave file support to the Montana Historical Society’s National Register Property Sign Program for the production of 52 new property interpretive plaques: 21 individual properties/districts and 31 contributing properties. The sign program is supported by an annual allocation from the Montana state accommodations tax.
- ✓ Regularly assisted in the preparation and distribution of press releases and stories of new and previously listed National Register properties across the state.

. Special Project: Formalize and document procedures for initiating and processing National Register nomination requests (2008-2012 Goals/Objectives I.1, III.3).

- ✓ Revised online procedures, guidance and forms for researching and listing properties in the National Register of Historic Places [Montana SHPO online guidance recognized and recommended by Keeper of the National Register program in November 17, 2008 memo to all National Register coordinators: <http://mhs.mt.gov/shpo/nationalreg.asp>]
- In-house Montana SHPO procedures for handling and prioritizing National Register nomination requests were not critiqued for revision due to staff vacancy.

DEVELOPMENT/ACQUISITIONS/COVENANTS PROGRAM

. Perform regular, allowable activities relating to historic property development, acquisition and/or covenants that contribute to the preservation of Montana’s cultural resource properties, including: the review or preparation of “pre-development” plans; assistance in the material conservation of National Register listed properties; support for the acquisition and preservation of historic sites; preparation and provision of technical assistance in historic architectural preservation; and the development and monitoring as provided for in historic property preservation agreements. {2008-2012 Goals/Objectives: I.1, IV.5}

- ✓ \$15,000 in matching SHPO state-funded support provided assistance to the preservation of the J.C. Adams Stone Barn in Cascade County and the Cavalry Stable at Fort Assiniboine in Hill County as part of the Montana SHPO Rural Property Brick and Mortar Program (aka “Barn Grant” program), in its second year of operation.

- ✓ \$27,000 in awarded matching SHPO state and HPF funds will support work through FY2009 at the Naylor barn on the Mountain View Ranch in Buffalo (Fergus County), the Old Settler's barn on the Chicken Creek Ranch in Clyde Park (Park County), and the Fenton Homestead barn near Sheridan (Madison County).
- ✓ Provided technical review and comment to the Montana Department of Commerce on thirteen historic site preservation project proposals submitted as applications for support in 2008 under the Montana Tourism Infrastructure Investment Program (aka TIIP grants).
- ✓ Routinely responded to public inquiries regarding historic building repairs and renovations. Assisted local projects (not compliance or tax credit) active in planning or implementation in FY2008, including the Rialto Theater reconstruction in Deer Lodge and the 1904 Railroad Depot in Eureka.
- ✓ Provided review and on-site assistance to state agencies for projects involving state heritage buildings on or eligible for the National Register. In FY2008 these included the Original Governor Mansion and Montana Veterans and Pioneers Memorial Building in Helena (Montana Historical Society); the Meade Hotel in Bannack NHL, Elkhorn Ghost Town in Jefferson County and Chief Plenty Coups Homestead NHL in Big Horn County (Montana Fish, Wildlife & Parks); Virginia City NHL and Reeder's Alley/Pioneer Cabin in Helena (Montana Heritage Commission); as well as University campus building renovations such as UM Western Main Hall in Dillon and McMullen Hall at MSU Billings (University).
- ✓ In conjunction with others, Pete Brown, SHPO Historic Architecture Specialist, helped organize and direct two volunteer preservation maintenance projects for the 1) Whaley Homestead on the Lee Metcalf National Wildlife Refuge (Fish & Wildlife Service/Montana Preservation Alliance, July 16-19, 2008) and for 2) Reeder's Alley/Pioneer Cabin in Helena (Montana Heritage Commission-Elderhostel, June 23-27, 2008). Lt. Governor John Bohlinger made a special work visit to the Reeder's Alley project.
- ✓ Participated in Recycling Education Forum held in State Capitol Rotunda, representing historic rehabilitation as "green" building recycling (November 8, 2007)
- ✓ Participated in preservation workshop sponsored by the Montana Preservation Alliance for identifying needs and developing opportunities for the preservation of the NR-listed Big Arm One-Room Schoolhouse in Lake County (September 25, 2008).

. Special Project: Develop and implement a scheduled historic preservation covenant property monitoring program (2008-2012 Goals/Objectives IV.4, V.3).

- ✓ Pete Brown, SHPO Historic Architecture Specialist, compiled a spreadsheet for the 29 historic properties under preservation covenants or agreements with the SHPO, including information on owner contact information, National Register status of the property, expiration of preservation agreements, and dates of visits to properties.
- ✓ Developed monitoring report format with photos to chronicle visits.
- ✓ Eight property visits made during FY2008.

PRESERVATION TAX INCENTIVES PROGRAM

. Perform regular, allowable activities related to the federal and other tax credit rehabilitation programs that contribute to the preservation of Montana's cultural resource properties, including: providing technical assistance and information to organizations and individuals related to the use of federal, state, and local tax incentives; and the review, inspection, and certification of federal tax act projects pursuant to 36 CFR 67 {2008-2012 Goals/Objectives: I.1, Iv.4, V.2}

- ✓ Over \$1,184,170 in federal tax credits representing \$5,920,892 million dollars in investment in commercial historic property rehabilitations reviewed by SHPO in FY2008.
- ✓ Tax Act credit projects active and ongoing in FY2008 include St. Josephs Hospital and the Ouelette Place in Lewistown, the Gladstone Hotel in Circle, the Montana Block and Wilmont Building in Livingston, and the Klos and Swift Buildings in Billings.
- ✓ The Judith Theater in Lewistown, the Zip's Automotive Building in Missoula, and the L&L Building, Oliver Building, Montana Power Building and Masonic Temple in Billings submitted certificates of completion (Part 3) in FY2008.
- ✓ Regularly responded to and met with owners of commercial properties considering the federal tax credit rehabilitation program. In FY2008 met onsite with interested owners of the Milltown Company Housing District in Bonner, the Metals Bank in Butte, and the Helena Dairy, Wesleyan Dorm Building, Harvard Block and Placer Hotel in Helena.
- ✓ Presented tax credit workshop at the Montana History Conference (Helena, October 18, 2007) and staffed information booth at annual "Dust to Dazzle" Historic Renovation Project tour in Butte (June 28, 2008).

REVIEW AND COMPLIANCE PROGRAM

. Perform regular, allowable review and compliance activities that contribute to the preservation of Montana's cultural resource properties, including: timely project

reviews with qualified professional staff according to applicable federal and/or state rules, standards and guidelines; specific assistance to federal agencies in fulfilling their responsibilities under Sections 106 and 110 of the National Historic Preservation Act; the development and participation in preservation compliance agreements; and the participation as legally designated in related state preservation laws and code, including the Montana State Antiquities Act, the Montana Human Skeletal Remains and Burial Protection Act and the Montana Repatriation Act (2008-2012 Goals/Objectives: III.2, IV.2, V.1, V.3, V.4}

- ✓ Reviewed and provided written responses to 1849 compliance project requests under the National Historic Preservation Act (Section 106), the National Environmental Protection Act, and/or state preservation law (Montana State Antiquities Act, Montana Environmental Protection Act). This represents an average of 7.4 written review and compliance consultations per *work day*, a slight decrease from 8.3 in FY2007.
- ✓ Provided same-day responses to the majority of the 1182 requests for initial SHPO cultural resource information and/or survey recommendations for project areas of potential effect, i.e. “file searches” (Response turn-around rate = 0.49 days, where 0 = same day; 1 = next *calendar day*). These FY2008 file searches involved a total of 12,973 sections of land.
- ✓ For the remaining 667 Review and Compliance written reviews and consultations for project undertakings (e.g., comments on cultural resource survey reports, evaluations of historical significance, determinations of effect, treatment options, preservation agreements for mitigation of adverse effects, etc.), the overall average response turn-around rate in FY2008 was 7.9 *calendar days* per consultation. This is well below the 30-day review time generally allowed for under preservation regulations.
- ✓ Of the 769 (out of 1182) initial project reviews and file searches in FY2008 when SHPO survey recommendations were requested, SHPO recommended no further cultural resource work necessary in 576 (75%) cases based upon existing information in the State Antiquities Database and staff determination that there was a low likelihood of impact to significant heritage properties within the project areas of potential effects.
- ✓ Participated in the development of and signed five (5) Memoranda of Agreement (MOAs) and three (3) Programmatic Agreements (PAs) with federal agencies and other concurring parties for the treatment and mitigation of adverse or potentially adverse effects to significant heritage properties under Section 106 of the National Historic Preservation Act.
- ✓ Out of the total 1849 project consultations in FY2008, only nine (9) federal and two (2) state undertakings resulted in new findings of *adverse effect* to National Register eligible heritage properties. Most of these concerned archaeological sites. The two state projects involve the state’s decision to proceed with land banking of trust lands for exchange in Hill and Blaine Counties that will result in the transfer

from public ownership of National Register eligible or potentially eligible archaeological sites without protective covenants. Of the nine federal undertakings resulting in adverse effects, four are state highway projects (Montana Department of Transportation on behalf of the Federal Highway Administration) that could not be re-designed to avoid all properties, two of which resulted in mitigation by excavation of archaeological sites. The remaining five federal adverse effect findings include: removal of a burned culturally-scarred tree on the Flathead National Forest (USFS); reconstruction of the Rimini Road in Lewis & Clark County (FHWA); construction of a fish ladder at the Thompson Falls Hydroelectric Project (FERC/Pacific Power & Light); archaeological data recovery related to development of a vehicle access road to Fort Union Trading Post NHS (National Park Service); and a modern renovation of the historic military chapel at Fort Harrison inconsistent with the Secretary of the Interior's Standards (Department of Defense/Montana Army National Guard).

- ✓ Hosted 30 office meetings and participated in 5 telephone/video conference calls with representatives of federal, state and local agencies, tribes, applicants, organizations or other interested parties regarding general programs and specific federal project undertakings with the potential to impact heritage properties.
- ✓ Made 12 on-site project and meeting visits, as requested by federal agencies for review of pending or ongoing compliance projects.
- ✓ Regularly consulted with state agencies involving projects on state land under the Montana State Antiquities Act, including the Montana Department of Natural Resources and Conservation (trust lands), Fish Wildlife & Parks, the Montana Heritage Commission (Virginia City NHL/Reeders Alley), and the University system.
- ✓ Provided staff support to the Montana Burial Board under the Montana Human Skeletal Remains and Burial Site Protection Act, including participation in annual board meeting in Helena, September 19, 2008.
- ✓ Four SHPO staff (SHPO Mark Baumler, State Archaeologist Stan Wilmoth, Review & Compliance Officer Josef Warhank, and Cultural Records Manager Damon Murdo) attended the annual statewide Bureau of Land Management Cultural Resource Program meeting in Havre, May 20-22, 2008, in accordance with the national Programmatic Agreement and Montana state protocol for BLM alternative program compliance with the National Historic Preservation Act.
- ✓ SHPO Historic Architecture Specialist Pete Brown was invited to and contributed in a week-long workshop in Vancouver, WA, sponsored by Federal Highway Administration (FHWA) to develop treatment alternatives under Section 106 for the rehabilitation of the Going-to-the-Sun Road NHL in Glacier National Park (November 26-30, 2007).

. Special Project: Prepare and disseminate standards, guidance, and procedures for consultation for cell tower project compliance (2008-2012 Goals/Objectives I.1, IV.4).

- ✓ Josef Warhank, SHPO Review and Compliance Officer, researched cell tower guidance prepared and disseminated by other states as well as existing online FCC instructions for cell tower consultation under the national FCC-ACHP-NCSHPO Programmatic Agreement for compliance with Section 106 of National Historic Preservation Act.
- ✓ Determined most frequently asked questions and concerns and prepared guidance accordingly for consultation with Montana SHPO. Emphasis placed on need for local consultation and comments.
- ✓ Posted new guidance on Montana SHPO website at <http://mhs.mt.gov/shpo/reviewcomp.asp>

LOCAL GOVERNMENT CERTIFICATION PROGRAM

. Perform regular, allowable activities relating to the certification of local governments in the Certified Local Government (CLG) program that contribute to the preservation of Montana's cultural resource properties, including: certification as eligible under Section 101c of the National Historic Preservation Act; processing of applications for certification or amendments of certification agreements; development of state program guidance and procedures; and monitoring and evaluation of existing CLG performance under sub-grants. {2008-2012 Goals/Objectives: IV.3, V.1, V.3}

- ✓ Passed-through \$82,500 (12.4%) in financial support from Montana SHPO FY2008 Historic Preservation Fund (HPF) allocation to 15 Montana communities and/or counties currently participating in the Certified Local Government program, exceeding the minimum 10% requirement.
- ✓ The Anaconda/Deer Lodge County CLG program was re-instated for funding in FY2008 at \$1,500 with the position of local preservation officer currently held by former local HPO Connie Ternes-Daniels.
- ✓ Communicated regularly with all Montana CLGs during the year. Maintained Montana CLG list-serve for communications.
- ✓ Performed formal performance evaluations of five CLG programs: Missoula (November 1-2, 2007), Great Falls-Cascade County (July 9-10, 2008), Butte-Silver Bow County, August 5-6, 2008), Helena-Lewis & Clark County (September 10-11, 2008), and Livingston (September 23-24, 2008). All met or exceeded performance standards.
- ✓ Conducted and provided attendance support for two 2-day orientation workshops for new CLG/Historic Preservation Commissioners at SHPO and the Montana Historical Society, February 6-7 and April 24-25, 2008.

- ✓ Hosted annual statewide CLG meeting in conjunction with the Montana History Conference in Helena, October 18, 2007.
- ✓ For a second year, Montana SHPO CLG Coordinator Rolene Schliesman participated as an invited visiting scholar-presenter in a week-long traveling Wyoming CLG-Preserve America Training Workshop for the communities of Riverton, Dubois, and Rock Springs, WY, June 4-7, 2008.
- ✓ Montana SHPO regularly encouraged and assisted CLG communities in becoming certified Preserve America communities, eligible for Preserve America grant and sub-grant funding. Twelve of the 15 Montana CLGs have been designated Preserve America communities.

OTHER ACTIVITIES (inc OUTREACH and MULTIPLE PROGRAMS)

. Perform regular, allowable other activities that contribute to the preservation of Montana's cultural resource properties, including: organization and participation in historic preservation outreach and education programs; assistance to HABS/HAER documentation projects; the support of statewide and local preservation organizations; and the conduct of other activities that cross-cut other program areas (2008-2012 Goals/Objectives: All)

- ✓ Routinely provided expertise in preservation, historic architecture, architectural history, and archaeology to the programs and projects of the Montana Historical Society.
- ✓ Regularly networked online and on phone with national preservation partners, including the National Conference of State Historic Preservation Officers (NCSHPO), National Trust for Historic Preservation (NTHP), National Alliance of Preservation Commissions (NAPC), and National Park Service (NPS).
- ✓ Co-sponsor of Montana Archaeology Month (April 2008). Organized and implemented mailing of 300 Montana Archaeology Week 2007 posters: *50 years of Public Archaeology*, celebrating the 50th anniversary of the Montana Archaeological Society.
- ✓ Facilitated the donation and cataloging of the Montana Archaeological Society archives (1958-1998) into the Montana Historical Society Research Center/Archives (<http://nwda-db.wsulibs.wsu.edu/findaid/ark:/80444/xv75942>)
- ✓ Provided financial operating support to and collaborated with non-profit statewide Montana Preservation Alliance in various non-lobbying efforts, including assistance in organization and review of applications for the MPA J.M. Kaplan Historic Industrial brick-and-mortar grant fund, organization of the 5th Annual Montana Statewide Preservation Workshop, and participation in a NTHP/MPA sponsored statewide preservation coordination meeting. Regularly published

articles on SHPO programs, projects and other initiatives in the Montana Preservation Alliance newsletter (*Preservation Montana*) and served as ex-officio MPA Board member in attending quarterly meetings.

- ✓ Maintained local statewide preservation list-serve with announcements and news related to state and regional preservation events and happenings.
- ✓ Regularly prepared or assisted the preparation of press releases for state preservation activities including National Register of Historic Places meetings and property listings, public talks and workshops, special events, and grant awards.
- ✓ Re-structured and added content to the Montana SHPO website:
www.montanahistoricalsociety.org/shpo
- ✓ SHPO staff presentations/public outreach:
 - Mark Baumler, State Historic Preservation Officer
 - University of Montana CRM class lecture, Missoula (Oct 11, 2007)
 - Moderator: Incarcerated under the Big Sky session, Montana History Conference, Helena (Oct 19, 2007)
 - University of Montana CRM class lecture, Missoula (April 8, 2008)
 - Field visit: Anzick archaeological site, Wilsall (April 29, 2008)
 - BLM Project Archaeology meeting (July 2, 2008)
 - Field visit: UM Montana Yellowstone Archaeological Research Project, Gardiner (July 11, 2008)
 - Montana Land Title Association meeting presentation, Whitefish (Aug 7, 2008)
 - University of Montana CRM class lecture, Missoula (Sep 18, 2008)
 - Pete Brown, Historic Architecture Specialist
 - *LEED Certification and Historic Rehabilitation Credits* presentation, Montana History Conference Workshop, Helena (Oct 18, 2007)
 - Display: *Historic Rehabilitation is Building Recycling*, State Capitol Rotunda, Helena (Nov 8, 2007)
 - U. of Montana Historic Preservation class lecture, Missoula (Feb 6, 2008)
 - *Dust to Dazzle* historic rehabilitation open house, Butte (June 28, 2008)
 - National Folk Festival information booth, Butte (July 12, 2008)
 - MT Preservation Alliance workshop presentation, Big Arm School (Sep 25, 2008)
 - Kate Hampton, National Register Coordinator
 - Moderator: Preservation & Architecture session, Montana History Conference, Helena (Oct 19, 2007)
 - Moderator: Montana's African-American History session, Montana History Conference, Helena (Oct 19, 2007)
 - Helena Preservation Commission meeting, Le Grande Cannon Boulevard nomination (Nov 14, 2007)
 - *The MHS History WIKI Project* presentation, Montana Historical Society, Helena (Jan 17, 2008)

- UM Helena College Public History class lecture, Helena (Jan 22, 2008)
- Display: *Teaching Historic Places*, MHS Teacher's Learning Academy workshop, Helena (Feb 11, 2007)
- U of M Historic Preservation class lecture, Missoula (Feb 20, 2008)
- *African-American Women in Montana History* presentation, Montana Historical Society, Helena (Mar 26, 2008)
- County History Initiative workshop presentation, Montana Historical Society, Helena (May 12, 2008)
- Yellowstone County Preservation Roundtable and National Register public workshop, Billings (May 20, 2008)
- National Folk Festival information booth, Butte (July 12, 2008)
- Roxann Lincoln, Preservation Grants Administrator
 - Preserve America community meeting, Boulder (April 3, 2008)
 - County History Initiative workshop presentation, Montana Historical Society, Helena (May 12, 2008)
- Damon Murdo, Cultural Records Manager
 - *Urban Preservation Practices* presentation, Montana History Conference Workshop, Helena (Oct 18, 2007)
 - Demo: Atlatl throwing, MHS Summer at Society program (July 16 & 23, 2008)
- Rolene Schliesman, Community Preservation Coordinator
 - *National Register & Community Survey* presentation, Western Heritage Center, Billings (Oct 29, 2007)
 - Billings Preservation Society meeting (Oct 30, 2007)
 - Butte City Commission meeting, Longfellow School demo (Nov 13, 2007)
 - Butte Citizens for Preservation & Revitalization meeting (Mar 11, 2008)
 - Preserve America community meeting, Boulder (April 3, 2008)
 - *The Economic Benefits of Historic Preservation* presentation, Montana Historical Society, Helena (May 1, 2008)
 - *2009 Invitation to Butte & Southwest Montana* presentation, Vernacular Architecture Forum (VAF) conference, Fresno, CA (May 10, 2008)
 - County History Initiative workshop presentation, Montana Historical Society, Helena (May 12, 2008)
 - *Neighborhood Conservation* presentation, Helena Historic Preservation Commission workshop, Helena (May 16, 2008)
 - *National Register: Fact or Fiction* presentation, Boulder (July 15, 2008)
 - *Community Benefits of Historic Preservation and Identifying Montana's Architectural Styles* presentations, Laurel (Aug 9, 2008)
 - Montana Mainstreet Advisory Committee meeting, Helena (Aug 20, 2008)
- Josef Warhank, Review and Compliance Officer
 - Moderator: Heritage & Preservation Resources Workshop, Montana History Conference, Helena (Oct 18, 2007)
- Stan Wilmoth, State Archaeologist
 - MHS museum docent training, Helena (Oct 29, 2007)
 - Field visit: Anzick archaeological site, Wilsall (April 29, 2008)
 - UM Helena College Archaeology class tour, MHS/SHPO (May 6, 2008)
 - BLM Project Archaeology meeting (July 2, 2008)

- Demo: Atlatl throwing, MHS Summer at Society program (July 16 & 23, 2008)
- ✓ Co-organized and participated in the 5th Annual Montana Statewide Preservation Workshop held in conjunction with the Montana History Conference in Helena, October 18-20, 2007. This year's forum included three half-day preservation workshops (*Urban Preservation Practices; Combining LEED Certification with Historic Rehabilitation Tax Credits; Heritage and Preservation Resources*), five preservation-related sessions (*Preservation and Architecture; Incarcerated Under the Big Sky: Deer Lodge Prison; Nuclear Montana: A History of Montana's Intercontinental Ballistic Missiles; Showcasing Montana University History Scholars; Real Voices on Notable Events of the Not-so-distant Past*), a CLG statewide meeting, and a Montana Preservation Alliance Awards Luncheon. SHPO awarded \$1300 in HPF/Preserve America funding for travel scholarships to local preservation participants to attend the 2007 conference.
- ✓ Led planning and organization for the 6th Annual Montana Statewide Preservation Workshop to be held in FY2009 in conjunction with the Montana History Conference in Glasgow, October 16-18, 2008
- ✓ Rolene Schliesman, SHPO CLG/Community Preservation Coordinator, continued to serve as co-chair for planning of the national Vernacular Architecture Forum (VAF) Conference to be held in Butte, MT in June, 2009. In addition to regular monthly planning committee meetings, Rolene hosted VAF Board Advisor Michael Koop in a 4-day field assessment of venue and tour locations (April 17-20) and attended the 2008 VAF Conference in Fresno, CA, in May to report on 2009 planning activities.
- ✓ Kate Hampton, SHPO National Register Coordinator, continued to lead the Montana Historical Society's *Identifying African-American History Resources* project funded by the Montana Cultural Trust (2005-2008) to compile and index Society and other statewide resources pertaining to the history of the African-American experience in the state. This information will be made available through the MHS website in 2009.

. Special Project: Support and facilitate the integration of historic preservation into heritage tourism initiatives and activities, including the national Preserve America heritage tourism and local economic development program (2008-2012 Goals/Objectives I.2, I.4, II.3, V.3).

- ✓ Roxann Lincoln, SHPO Preservation Grants Administrator, participated in the 2008 Governor's Conference on Tourism, in West Yellowstone, April 16-18, 2008.
- ✓ Rolene Schliesman, SHPO Community Preservation Coordinator, advised and assisted communities in applying for designation as Preserve America communities. New FY2008 Montana designations include Kalispell, Bozeman, Jefferson County and Lewis & Clark County.

- ✓ Implemented first year of 2-year Preserve America grant for \$100,000 (received September, 2007) in support of the *Montana Heritage Preservation Training Initiative*. In FY2008, these funds were allocated or re-distributed in the form of matching sub-grants to Montana Preserve America communities, organizations, and forums for heritage training/education venues and materials, as follows:

▪ Butte CPR: How-to Workshop Series	\$ 4,120
▪ Butte: <i>Drumlummon Views</i> special preservation issue	\$ 8,000
▪ Havre: Downtown & RR District tour/programs/website	\$ 7,100
▪ Great Falls: Missouri River Corridor walking tour	\$ 3,000
▪ Missoula: 2009 Experience Missoula Heritage Festival	\$12,768
▪ Stevensville: Chief Victor Days Salish presentation	\$ 1,137
▪ MHS: Montana History textbook teacher workshops (3)	\$10,000
▪ MPA: Historic Preservation Workshops (4)	\$13,500
▪ Conference support (VAF2009, MT Pres Conf 2008/2009)	\$15,875
▪ Local scholarship/travel fund to heritage training venues	\$11,500
▪ SHPO staff trainers and staff development	\$ 8,000
▪ Grant administration/indirect charges	\$ 5,000
- ✓ Successfully applied for and received a 2008 2-yr Preserve America grant for \$149,979 in support of *Montana Places: Expanding the Cultural and Historical Record of Montana* (see above, Survey & Inventory).
- ✓ Met with Montana Department of Commerce, Travel Promotion Division, to discuss state heritage tourism initiatives and development of a joint (SHPO-Travel Montana) Preserve America application for marketing to submit in FY2009.
- ✓ Created new page on SHPO website for Montana SHPO Preserve America sub-grant activities: <http://mhs.mt.gov/shpo/PreserveAmerica.asp>
- ✓ Assisted Miles City art museum director with images and text for heritage tourism presentation at Montana Tourism Advisory Council meeting.

. *Special Project: Update and post public contact information for historic preservation organizations and agencies (2008-2012 Goals/Objectives I.3, V.1).*

- ✓ SHPO staff worked together to update and restructure the Montana Preservation Services Directory, re-formatting it under three separate headings: *Preservation Law*, *Dollars for Preservation*, and *Preservation People*. The latter includes current contact information for agency and organizations as well as consultants and professional services. All three sections are accessible through the Montana SHPO homepage at <http://mhs.mt.gov/shpo/default.asp>